

Summary of PAM Changes December 2004

General Comments:

- Effective July 2005, updates to the PAM will occur on a semi-annual basis. PAM, Revision 2 dated December 2004 represents the last quarterly update.
- The PAM revision #2, dated December 2004 is available in both a Tracked version (identifying where changes have occurred) and an Updated version, (updated and no tracking notations).
- Revision 2 of the PAM introduces a numbering sequence to identify information contained in individual information blocks. The numbering configuration is top to bottom and translates Chapter, Section, Topic, Information block number.

Example: 4.A5.4 translates to Chapter 4, Section A, Topic 5, the 4th information block.

Example: 7.1.0 translates to Chapter 7, Topic 1, 1st information block.

- Revision 2 of the PAM updates each Chapter's Table of Contents to include Section, Topic and Information Block titles and page numbers.
- This revision hyperlinks the Procurement Related Resources Directory to procurement programs throughout PAM.

New Attachments:

- ❖ Chapter 2:
 - Surface Mining and Reclamation Act Certification Form
- ❖ Chapter 3
 - Solicitation Language for Non-small Business Preference
- ❖ Chapter 4:
 - Evaluation Selection Report
 - RFQ Solicitation Language for Award of Contract and Protests
 - Evaluation and Selection Team Procedures
 - Data Center Interagency Agreement Quarterly Report

Revised Attachments:

- ❖ Introduction
 - Acronyms and Abbreviations
- ❖ Chapter 1:
 - PAMS contact list
- ❖ Chapter 12
 - Calendar of Reports
- ❖ Chapter 13:
 - Application Part C
 - Application Part D
 - Application Part E

Chapter	Section	Topic	Page(s)	Information Block	What Changed
Intro			3	1.4	Corrected title of chapter 9
Intro			5	1.7	PAM revisions will transition from quarterly releases to semi annual releases.
1		3	10	1.3.0	Updated Purchasing Authority category/dollar threshold chart deleting PIA SPS as a category.
1		3	11	1.3.1	Clarify that non-IT services exceeding \$4,999.99 must be extracted for a non-IT goods purchase and processed as service contract via SCM, Vol. 1.
1		5	19-20	1.5.0	Clarification of how to effect changes to PCO/PAC names by completing and submitting Part A of the Application.
2	B	7	16	2.B3.0	Described additional documentation requirements on promotional material purchases.

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2	B	7	25-26	2.B7.0 – 2.B7.3	Added Desktop and Mobile Computing Purchases in accordance with BL 04-26. This is a new topic and as such, remaining topic numbers have been adjusted accordingly.
2	C	1	31	2.C1.1	Deleted vehicle modification reference as being a non-IT service in "Note".
2	C	3	34-36	2.C3.2 – 2.C3.7	Updated this map with current PIA information, identifying how departments handle PIA purchases.
2	C	4	37	2.C4.2 – 2.C4.3	Provided information on how departments do business with OSP and information on identifying union label for printing projects when not using OSP.
2	C	7	42	2.C7.2	Deleted reference to Workgroup Computing Justification Form and replaced with requirement on how departments will identify desktop and mobile equipment purchases. Deleted reference on amending a WCJF when adding components to existing system.
2	D	1	46	2.D1.3	Hyperlinked the "discussion note" for access in both Word and PDF.
3		5	11-13	3.5.0 - 3.5.6	Added new topic on the requirements for the non-small business subcontractor preference. Remaining topic numbering has been adjusted to accommodate this topic.
3		6	15	3.6.4 – 3.6.5	Clarified the maximum preference amount allowed individually and in combination. Added hyperlink to the Dispute Resolution and Preference Program web page.
4	All	All	1-48	4.A1.0 – 4.D5.3	Major revision to the chapter. Provided additional information and requirements regarding the various competitive solicitation approaches, evaluation and awarding of these transactions.
5		1	5	5.1.6	Clarification of signature authority for NCBs.
5		1	6	5.1.7	Added a statement on retaining the Notice of Contract Award in the procurement file.
5		2	8 – 9	5.2.0	Minor corrections to wording and added a statement of NCB document retention.
5		2	10	5.2.2	Referenced reader to Chapter 4 for fair and reasonable techniques.
5		3	12	5.3.1	Clarification on amending purchase documents for quantity or time.
5		5	16	5.5.0	Clarified that a letter from a software publisher, manufacturer, etc. must include a signature.
5		5	18	5.5.1	Clarified that a letter from a software publisher, manufacturer, etc. must include a signature.
5		5	19	5.5.2	Same as above.
5		5	19	5.5.3	Added cost reasonable justification recommendation for propriety software purchases.
5		6	20	5.6.2	Added information type of statement that should be in the procurement file support cost reasonableness

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6	A	1	7	6.A1.0	Updated categories and dollar thresholds deleting PIA SPS as an LPA.
6	A	1	7	6.A.1.1	Clarify to reader the MA user instructions.
6	A	1	8	6.A1.2	Added other possible methods and addresses to delivery non-IT service transactions to DGS.
6	A	3	16	6.A3.1	Added clarification in document terminology when using LPA – “Request for Offers” Updated block to state that the two envelope evaluation process is not to be used in conducting LPA transactions.
6	A	3	16	6.A3.2	Clarified that documenting “best value” on exempt LPAs is not required.
6	A	5	21	6.A5.0 – 6.A5.1	Updated the information to describe when an amendment does not require an NCB.
6	B	2	24	6.B2.5	Updated this information to link the reader back to Chapter 4 on how to document fair and reasonable on CMAS transaction under \$5,000.00.
6	B	2	25	6.B2.6	Added requirement to retain a copy of the NCA document within the procurement file as applicable to the purchase.
6	B	2	26	6.B2.7	Same as above.
6	D	1	34	6.D1.7	Added requirements for purchasing archive boxes.
6	E	1	36	6.E1.1	Deleted reference to WCJF.
6	E	1	37	PIA	Deleted reference to PIA SPS.
6	F	1	39	6.F1.0	Added recommendation on how to identify an exempt MA in the procurement file.
6	F	1	39	6.F1.2	Additional information to explain the purpose of the MA user instructions.
6	F	1	40	6.F1.3	Added information on how to acquire industrial cloths, uniforms and dust control rental transactions.
6	F	2	41	6.F2.1	Directed reader to individual MA user instructions and updated LPA terminology. Deleted “solicitation” replaced with “RFO”.
6	F	3	45	6.F3.1 – 6.F3.2	Minor clarifications. WSCA is a MPA. WSCA transactions are not required to document best value.
6	F	3	46	6.F3.6	Statement on retaining NCA document in procurement file.
6	F	3	47	6.F3.7	Added requirement to retain NCA document as applicable to the transaction.
6	F	4	48	6.F4.3	Deleted reference to WCP. Added wording to state obtaining multiple offers not required for Cal-Store transactions.
6	F	4	49	6.F4.4 – 6.F4.5	Clarifying that if an NCA is created, a copy of the NCA must be in the procurement file.
7			1-12		No significant changes to chapter other than adding the number system to information blocks.
8		4	12	8.4.3	Added requirement on completed purchase documents for PIA transactions.
8		4	12	8.4.5	Added information regarding price bundling.

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9			1-24		No significant changes to chapter other than adding the number system to information blocks.
10			1-18		No significant changes to chapter other than adding the number system to information blocks.
11			1-8		No significant changes to chapter other than adding the number system to information blocks.
12		3	12	12.3.0	Updated this topic to identify that the Ethnicity, Race, Gender & Minority Women, DVBE Reporting is suspended until 2008 (AB 79)
12		9	20	12.9.0	Updated this topic to identify that the State Agency Recycled Campaign Procurement Report is suspended until 2008 (AB 79)
13		4	18		Deleted IT Workgroup Computing Policy
13		5	19	13.5.4	Deleted reference to Attachment D5.